#### Step by Step Instruction:

How to Conduct Direct Certification using File Upload: Standard Format

Professional Standards Learning Code 3120 Length: 1 hour



#### Revised March 2016

"How to Conduct Direct Certification using File Upload: Standard Format" is intended for the School Food Authorities in the state of Arizona. All regulations are specific to operating the National School Lunch Program under the direction of the Arizona Department of Education.

#### Objectives

This training will provide guidance on:

- How to create and upload a spreadsheet in CNP Direct Certification/Direct Verification using the File Upload Method, using the Standard Format for all students;
- How to understand the results;
- Common errors that come up using this search method.

### Comprehension

- Throughout this guide there will be comprehension quiz questions to test your knowledge and help you apply what you're learning.
- Be sure to review these quiz questions and the answers, available within the guide.
- This icon will indicate a comprehension quiz question, and the background of the slides will be a light blue/green like you see on this slide.



### File Upload: Standard Format

#### File Upload: Standard Format

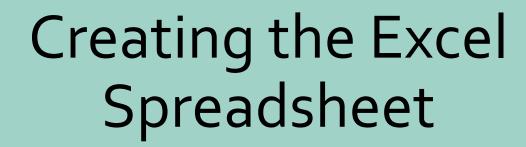
- This method is recommended to search the eligibility of a large number of students.
- User must:
- 1. Create an excel spreadsheet and enter the first name, last name and birthdate of the students using a header of "Standard"
- 2. Save the excel spreadsheet as a "CSV" file
- 3. Upload the file into CNPDirectCertification system to run the report

### File Upload: Standard Format

#### The Step by Step Instruction will review:

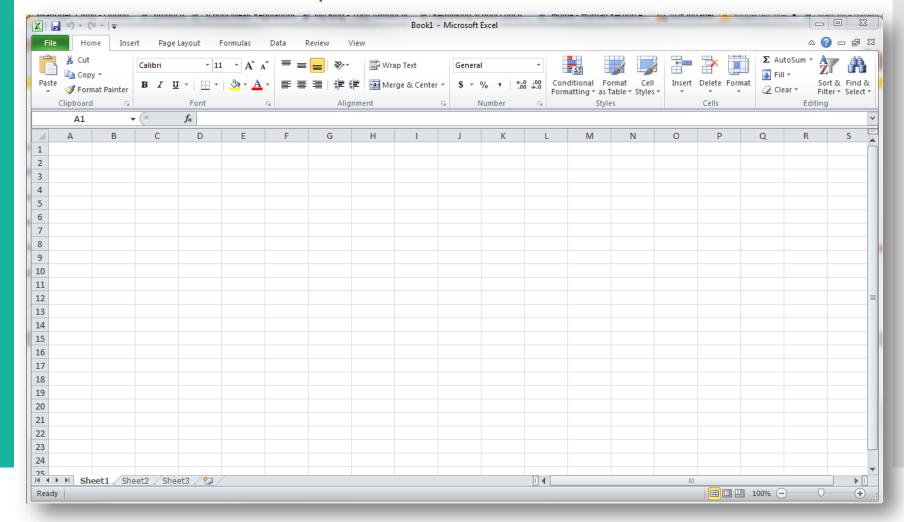
Create the Excel Spreadsheet using Standard format	Slides 6-24
Log into CNP Direct Certification	Slides 25-32
Uploading the Excel Spreadsheet using Standard format	Slides 33-40
Results of DC Report	Slides 41-50
Upload Errors	Slides 51-54

The following slides will only cover how-to instructions for File Upload using Standard Format. Please refer back to the ADE webpage for other upload methods.



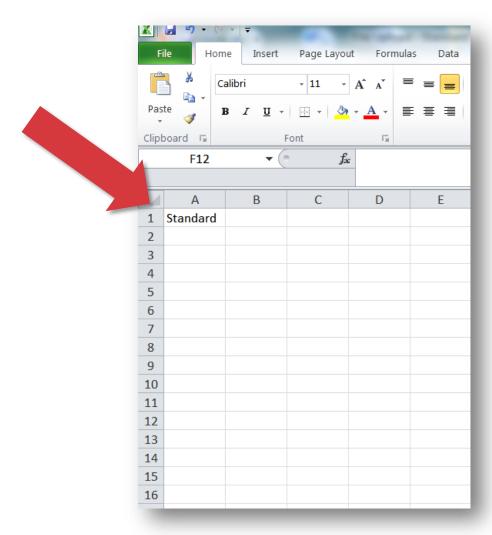
# Creating a File Using Standard Format

1. Open the Excel application on your computer. Your screen should have a blank spreadsheet.



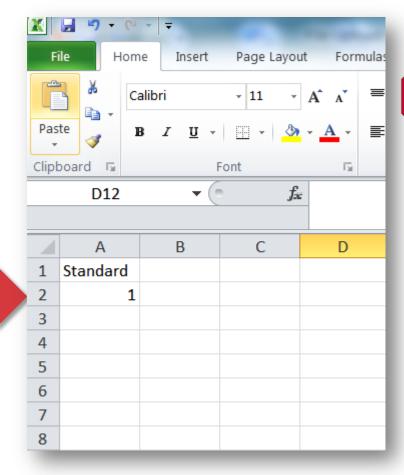
# Creating a File Using Standard Format

2. Type the word "Standard" entered into cell A1.



# Creating a File Using Standard Format

3. Starting on row 2, type any number under the word Standard. Best practice type the number "1" in column A or the student's school ID. For every student name, there will be a record number. For example, record numbers could be entered sequentially by 1, 2, 3 ... etc. User may enter unlimited amount of entrees.





It does not matter which student name is listed next to which record number.

#### Comprehension Check

What should you type in cell A1 when creating the file using Standard format?

- A. The number 1
- B. Standard Format
- C. A student name
- D. Standard



### Comprehension Check

What should you type in cell A1 when creating the file using Standard format?

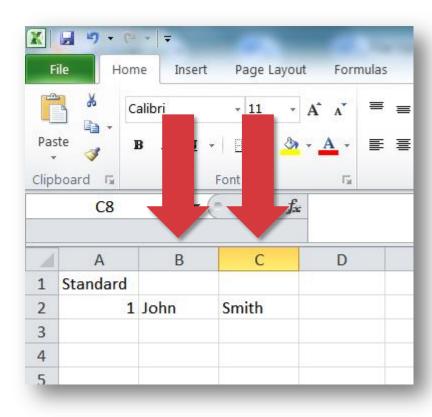
- A. The number 1
- B. Standard Format
- C. A student name
- D. Standard

The system will only accept files that are formatted correctly. Be sure the first column, first row (cell A1) says Standard. Anything else in that first cell will create an error and will not produce search results.



# Creating a File Using Standard Format

4. Next to the record number "1" type in the student's first name in column B and the student's last name in column C.

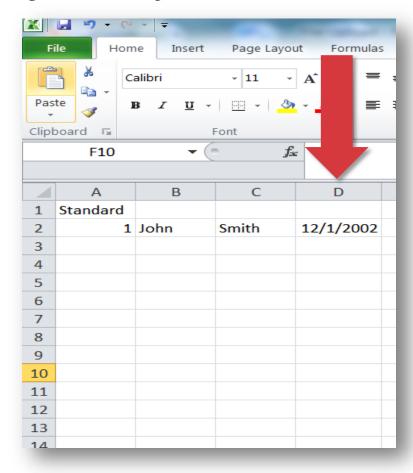




First name must be in column B. Last name must be in column C.

# Creating a File Using Standard Format

5. Enter student's birthday in column D in the format: mm/dd/yyyy. (Note: Excel will automatically remove the zeros for the day and month)

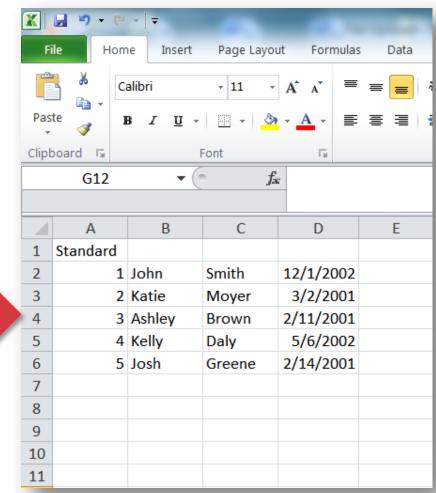




Make sure the year has 4 digits.

# Creating a File Using Standard Format

6. Repeat steps #3-5 for every student. Each row must have a record number, first name, last name, and birthdate.



### Comprehension Check

How should the birthdate for each student be formatted?

- A. Month, Date, Year each spelled out (March 4, 1998)
- B. MM/DD/YYYY (03/04/1998)
- C. Month-Date-Year (3-4-98)
- D. As a set of numbers with no spaces or dashes (341998)



### Comprehension Check

How should the birthdate for each student be formatted?

- A. Month, Date, Year each spelled out (March 4, 1998)
- B. MM/DD/YYYY (03/04/1998)
- C. Month-Date-Year (3-4-98)
- D. As a set of numbers with no spaces or dashes (341998)

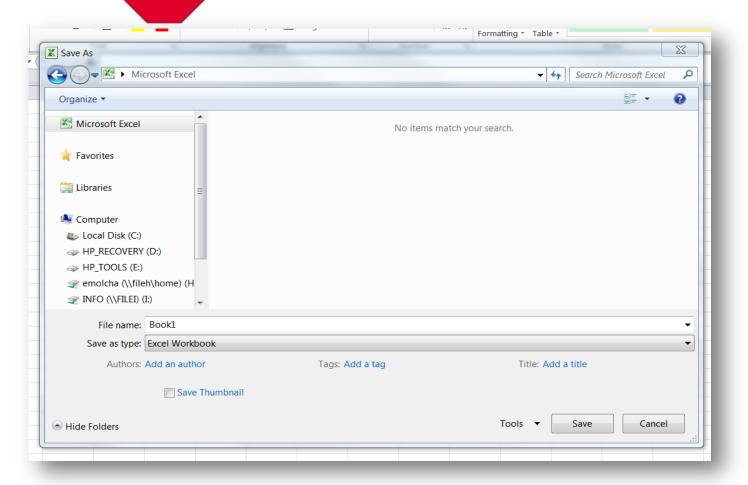
The system will search the DES database for exact matches. This means the birthdates need to be listed exactly like they are in the DES database, which is MM/DD/YYYY. Note: Excel will automatically remove the preceding zeros, and that is acceptable. Refer to slide 13 for a reminder about this guidance.



#### Creating a File Using Standard Format

7. When all student's have been entered, click "File" and choose the option "Save As". A small window should appear.

STOP DO NOT CLICK SAVEYET!



#### Comprehension Check

Can you save the file for uploading by clicking the save icon 3.2.



- Yes. As long as you know where you save the excel file, it can be uploaded.
- Yes. That icon automatically saves the file in the format needed for the search.
- No. You have to click Save As and choose a .csv file before you save it.
- No. That icon doesn't save the file anywhere on your computer.



#### Comprehension Check

Can you save the file for uploading by clicking the save icon 3.2.

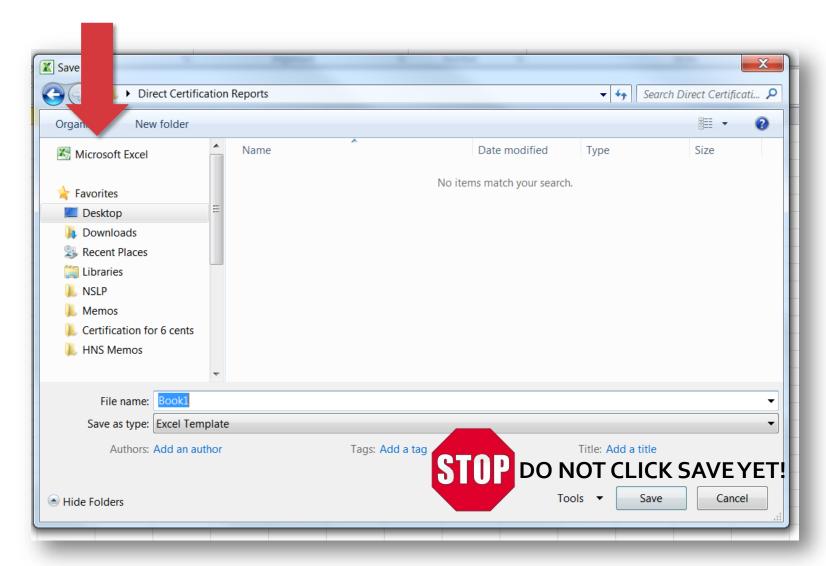


- Yes. As long as you know where you save the excel file, it can be uploaded.
- B. Yes. That icon automatically saves the file in the format needed for the search.
- No. You have to click Save As and choose a .csv file before you save it.
- No. That icon doesn't save the file anywhere on your computer.

The icon shown will save the file as an excel file (.xls). In order to do a file upload, the file must be a .csv format, so you need to use the Save As feature to change the file format. Refer to slides 14-17 for instructions on how to do this.

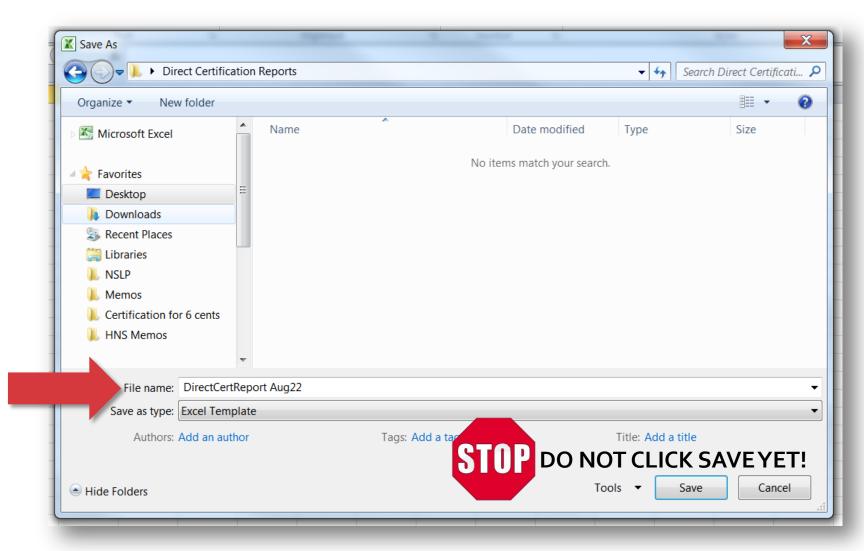
# Creating a File Using Standard Format

8. Select the location where to save the file.



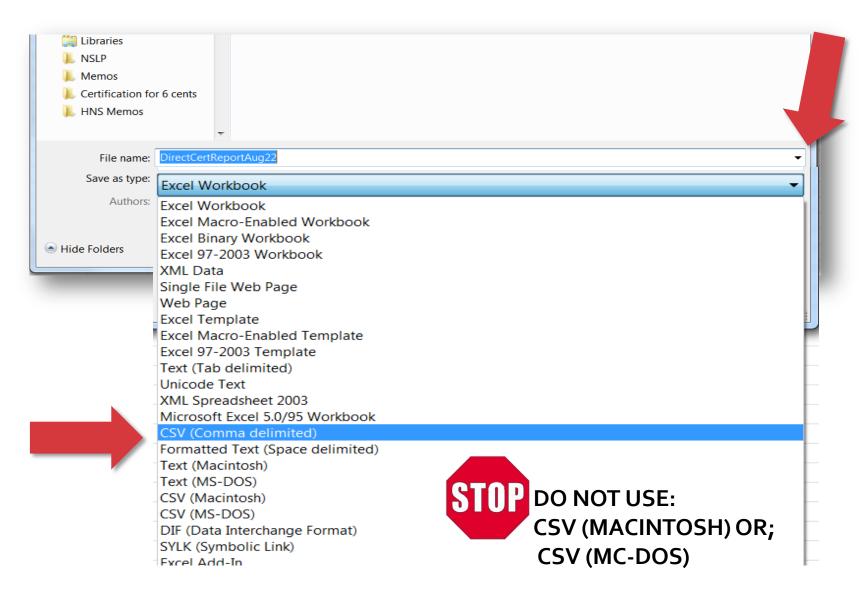
# Creating a File Using Standard Format

9. In the field "File Name", name file. As best practice, user may wish to include date in file name.



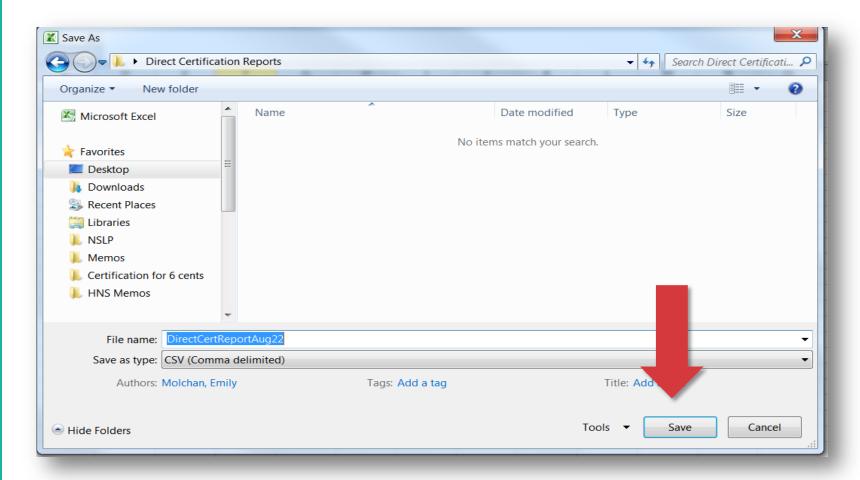
# Creating a File Using Standard Format

10. In the field "Save as type", use the drop down to select CSV (Comma delimited).



# Creating a File Using Standard Format

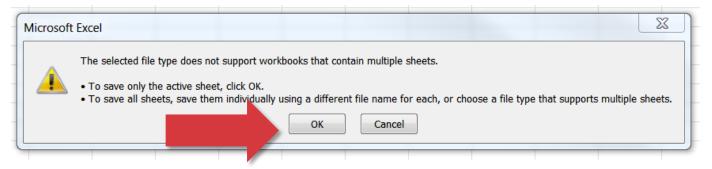
#### 11. Click "Save"



# Creating a File Using Standard Format

Depending on which version of excel being used, the following windows may pop up after clicking "Save".

Click "OK" to confirm saving the file.



Click "Yes" to confirm saving the file.





### 9. Go to the ADE health and Nutrition Webpage: <a href="http://www.azed.gov/health-nutrition/">http://www.azed.gov/health-nutrition/</a>



10. Locate "Common Logon" on the upper right of the webpage. Click on the Common Logon link.



#### A new webpage will load. It should look like this screen.

ARIZONA DEPARTMENT  OF EDUCATION  CO	MMON LOGON
The gateway to secure data transactions and information	
Username:	
Password: Continue >>	
Please note that our web pages have new functionality which will log you out and take you back to this page if your session remains idle for too long a period of time.	
We have changed our practices regarding passwords and user accounts. <u>Click here</u> for Current Password Process.	
If you have lost your password <u>Click here</u> .	
• To launch an application the user must have a valid username and password and must agree that, by using that username and password, they will abide by the ADE Acceptable Use Policy.	
• Any questions related to Common Logon account, please contact the ADE Support Center at (602) 542-7378 if you are in the Phoenix area. Outside the Phoenix area (866) 577-9636 or E-mail enterprise@ade.az.gov. Or Click here for more information.	
Check the MIS Bulletin Board for the latest news and information.	

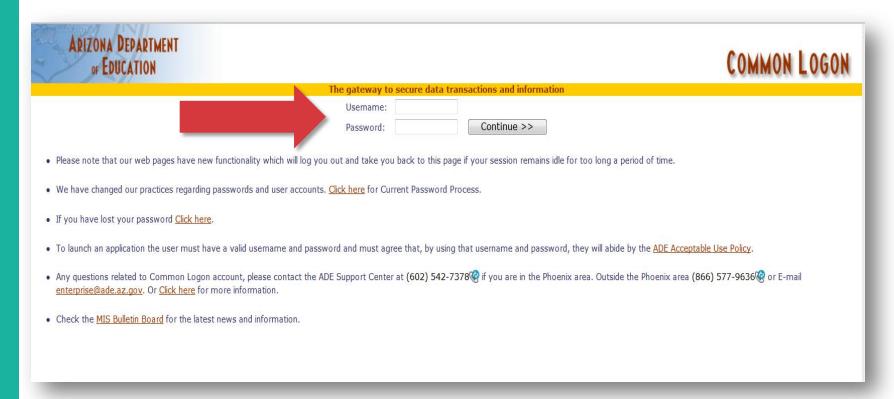


You must have a user name and password in order to access Common Logon.

At <a href="http://www.azed.gov/health-nutrition/nslp/program-forms/">http://www.azed.gov/health-nutrition/nslp/program-forms/</a>

- 1. Read the Online Training Manual
- Complete the Requesting Common Logon Permissions for NSLP/Direct Certification, requesting Direct Certification permissions, and send to ADE.
- 3. Receive Common logon username and password in 7-10 days

#### 11. Enter your Username and Password.



#### Once logging in, your webpage will show all Common Logon Applications you have access to.

The gateway to secure data transactions and information

Common Logon Application Menu

- CNP Direct Certification / Direct Verification
- CNP Verification
- EA Profile

Change Profile Logout



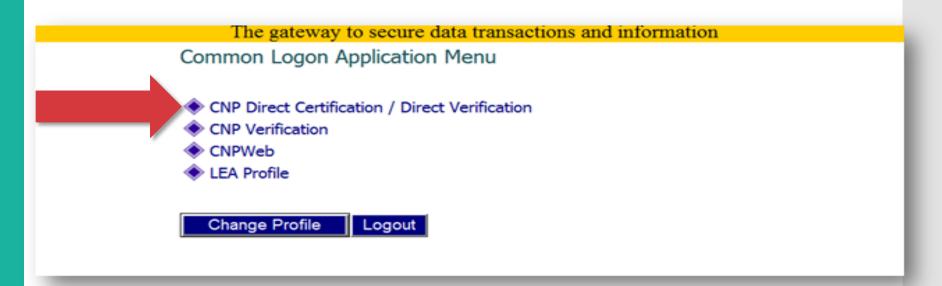
You must have access CNP Direct Certification/Direct Verification. This is an <u>additional</u> option on the Common Logon Permissions form.

\*If you already have a user name and password, but do not see the CNP Direct Certification/ Direct Verification option:

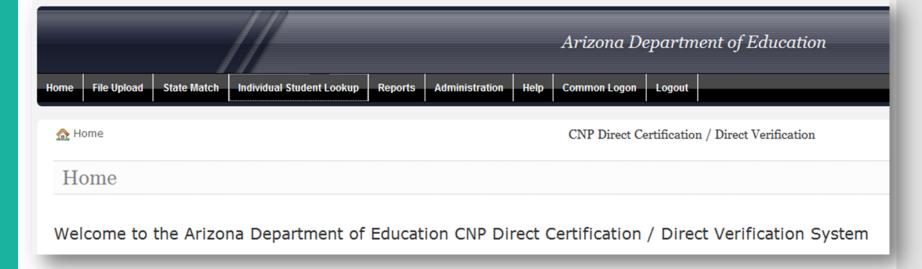
At <a href="http://www.azed.gov/health-nutrition/nslp/program-forms/">http://www.azed.gov/health-nutrition/nslp/program-forms/</a>

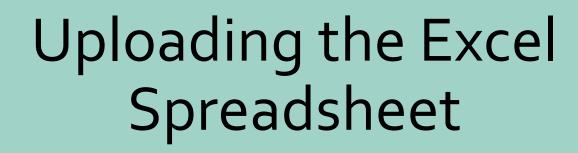
- Complete the Requesting Common Logon Permissions for NSLP/Direct Certification to <u>ADD</u> the Direct Certification permission. Send to ADE.
- Receive CNP Direct Certification/ Direct Verification access in 7-10 days.

12. Click on CNP Direct Certification/Direct Verification



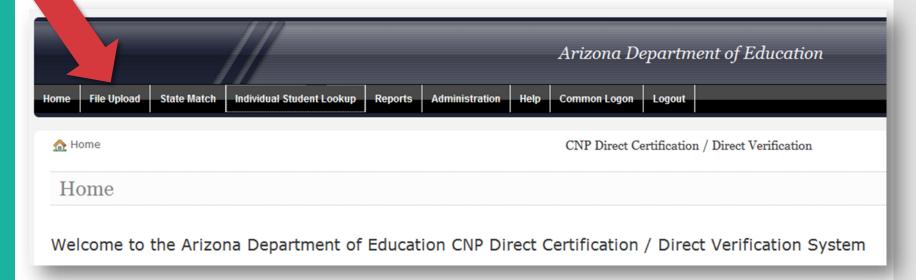
A new screen will load. It should look like this.





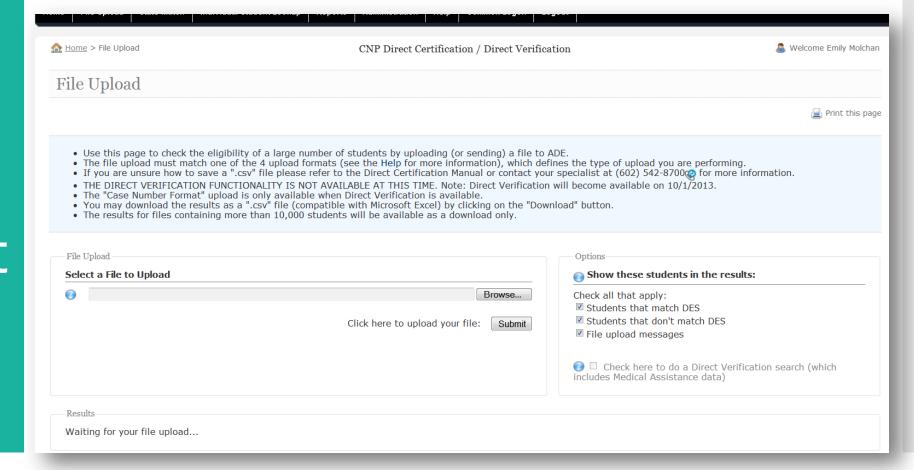
## Uploading the Excel Spreadsheet

16. Click on the option in "File Upload" found at the top of the webpage. should look like this.



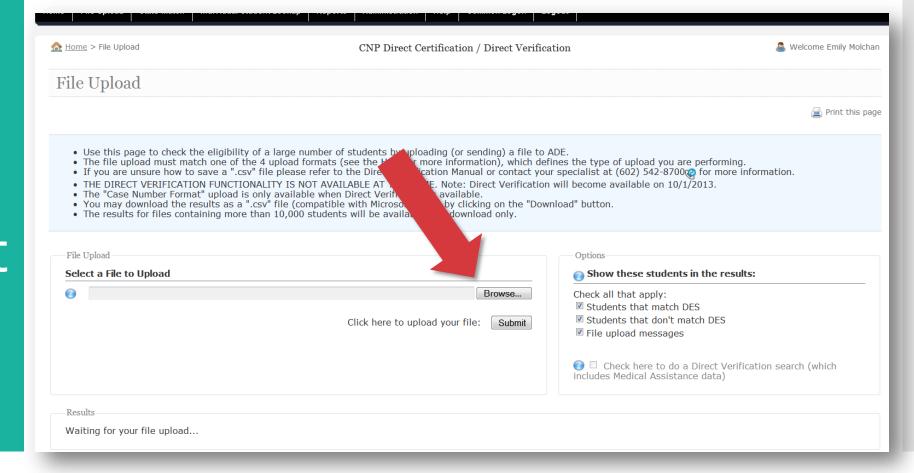
## Uploading the Excel Spreadsheet

Once you have selected "File Upload", the webpage should look like this:

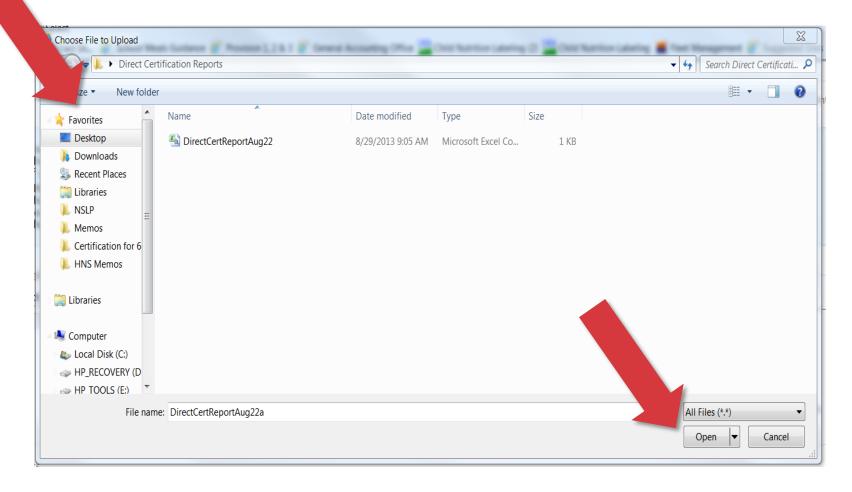


## Uploading the Excel Spreadsheet

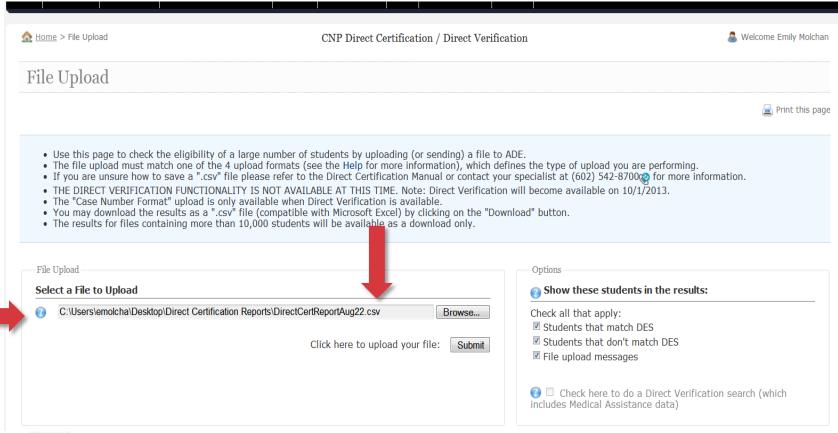
17. Click on the "Browse" button to upload the excel file created above.



18. By clicking "Browse" a window will come up that looks like this. Find where you saved the excel file. Click "Open".



The field below should be filled with the file with a ".csv" ending.

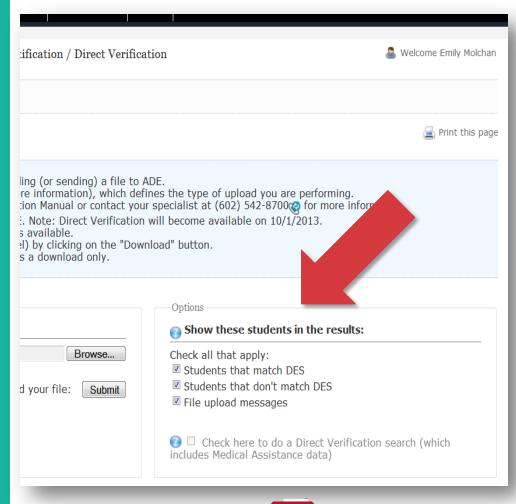




The file MUST be a CSV file. Check the end of your file name in the field. It must have a ".csv".

If it is a ".xls", the report will not run.

19. Choose how you want to view your results.



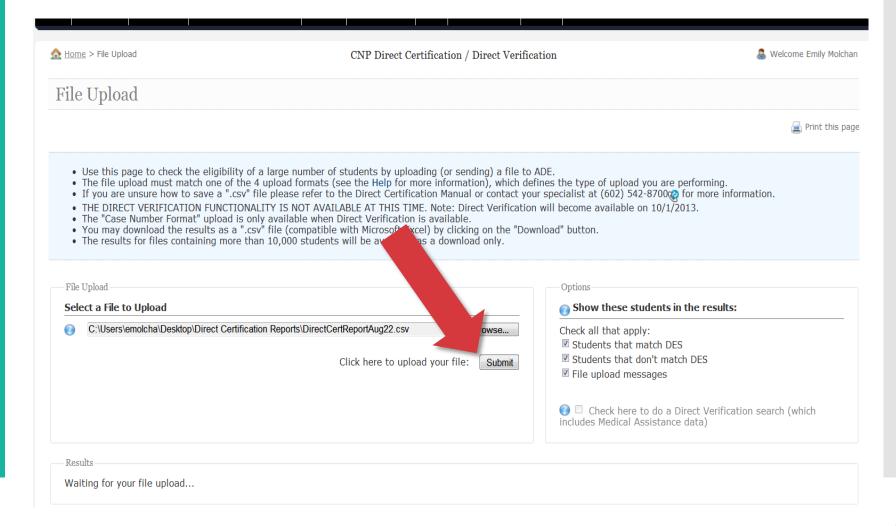
- By choosing only "Students that match DES" the report will show matches.
- By choosing only "Students that don't match DES" the report will show no matches.
- By choosing both boxes, the report will provide matches and no-matches.
- By choosing "File upload messages", the report will provide error messages associated with upload.

You may choose all three boxes.



Do not select the "Check here to do a Direct Verification search" when running a Direct Certification report. This option is ONLY to be use during Verification activities.

#### 20. Click "Submit" to run the report.



# Results of CNP Direct Certification

#### Changes to Results of CNP Direct Certification View effective May 2014

 ADE's CNP Direct Certification/Direct Verification system has been updated. Specifically, the match results now include additional data columns with program participation information. These new columns have been added to ensure LEAs can accurately report student eligibility information when it is required for the CNP Verification Summary Report. The new columns are SNAP, TANF, MA, and Foster. The DES Results column (Match or No Match) is still displayed. LEAs must continue to utilize the DES Results column to determine if a student is Directly Certified. Please note, students participating in more than one program will only be counted once in the total "Matches Found" section of the Results box. Please visit our website www.azed.gov/healthnutrition/nslp/programguidance/ to view Step-by-step Instruction for using the CNP Direct Certification system.

### Your results page will look like this for the Standard Format:

# File Upload Results

Processed as:	Standard										
Prepared by:	Mia Calamia	Date Prepare	d:	5/28/2014 8:03	Click here to download your results:						
Direct Verification:	No	Displaying:		Matches , Non-Ma							
Records Processed:	8		ors Found:	0							
Matches Found: 0  SNAP Matches: 0  TANF Matches: 0		Non-Matches	Found:	8							
		MA Matches:		0							
		Foster Match	es:	0							
Record Number *	First Name	Last Name	Birthdate	DES Results	DES Decision Date	SNAP	TANF	MA	FOSTER	Upload Message	
1	carson	millers	12/02/1991	No Match							
2	Jessica	Aldroff	10/29/2001	No Match							
3	Faith	Harlton	08/23/2003	No Match							
1	Tyran	Boss	06/19/2004	No Match							

Do NOT close the window. Go to the next slide for two options to save the report.

#### File Upload Results

You must keep this report for your records.

#1. Print report directly from webpage, OR

#2. Download the report to save on your computer to access at any time.

Processed as:	Standard											
Prepared by:	Mia Calamia	Date Prepare	d:	5/28/2014 8:03		Click here to download your results:						
Direct Verification:	No	Displaying:		Matches , Non-Ma								
Records Processed:	8 Validation Errors Found: 0 Non-Matches Found: 0 MA Matches: 0 Foster Matches:		ors Found:	0								
Matches Found:			ches Found: 8									
SNAP Matches:				0								
TANF Matches:			es:	0								
Record Number *	First Name	Last Name	Birthdate	DES Results	DES Decision Date	SNAP	TANF	MA	FOSTER	Upload Messag		
	1 carson	millers	12/02/1991	No Match								
1	2 Jessica	Aldroff	10/29/2001	No Match								
	3 Faith	Harlton	08/23/2003	No Match								
			C C									



The CNPWeb Direct Certification application does NOT save your full report. The webpage only records a report has been run. Once user closes out of window, user must re-upload the file to get the results.

## Comprehension Check

True or False: Once you see the results, you are done with Direct Certification.

- A. True.
- B. False. You have to email ADE to let them know you did Direct Certification. Once you do that, you are done.
- C. False. You must save or print your report and keep them on file. Once you have saved and/or printed the results, you are done conducting Direct Certification



## Comprehension Check

True or False: Once you see the results on the screen, you are done with Direct Certification.

- A. True.
- B. False. You have to email ADE to let them know you did Direct Certification. Once you do that, you are done.
- C. False. You must save or print your report and keep them on file. Once you have saved and/or printed the results, you are done conducting Direct Certification.

All LEAs must keep these results on file. They can be saved electronically, printed out, or you can do both. The key is that you must be able to access the results at any time.

## Report Results FAQ

### Q1. Do I need to download my results or can I just print the webpage?

Whichever method works better for the user. Upon request, the SFA must provide a copy of the original report and the date it was collected. Please note: when downloaded, the top summary bar (including date report was run) is not included. ADE recommends noting the date within the file.

Processed as:	SAIS ID											
Prepared by:			Date Prepared: Displaying:		5/28/2014 8:45 AM Matches , Non-Matches			nere to d	ownloa	d you	ır results:	
Direct Verification:												
Records Processed:         4           Matches Found:         0           SNAP Matches:         0           TANF Matches:         0		Validation	Errors Found:	0		$\sim$						
		Non-Match	es Found:	4								
		MA Matche	MA Matches:									
		Foster Mat	ches:	<b>)</b>								
									,			
Record Number *	SAIS ID	School Student ID	First Name	Last Name	Birthdate	DES Results	DES Decision Date	SNAP	TANF	МА	FOSTER	Upload Messa
Record Number •	SAIS ID 1231231	School Student ID	First Name	Last Name	<b>Birthdate</b> 01/01/1900	DES Results  No Match	DES Decision Date	SNAP	TANF	МА	FOSTER	Upload Messa
Record Number 1		School Student ID	First Name	Last Name			DES Decision Date	SNAP	TANF	МА	FOSTER	Upload Messa
Record Number 1 2 3	1231231	School Student ID	First Name	Last Name	01/01/1900	No Match	DES Decision Date	SNAP	TANF	МА	FOSTER	Upload Messa

## Report Results FAQ

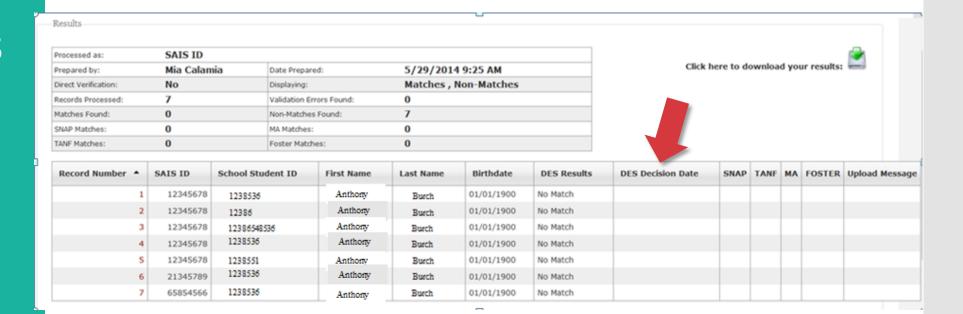
# Q2. Would ADE accept my Direct Certification report if I copied the results of "Match and No Match" information onto an excel spreadsheet?

ADE will ask to see the original report created from the search. The SFA must keep the <u>original search results format</u> from the webpage or downloaded results. As long as the SFA has at least one copy in its original form, the SFA can copy the results into their own format.

### Q3. On my results page, is it ok if the column "Decision Date" is blank?

Yes, it is ok if the column Decision Date is blank on the results report.

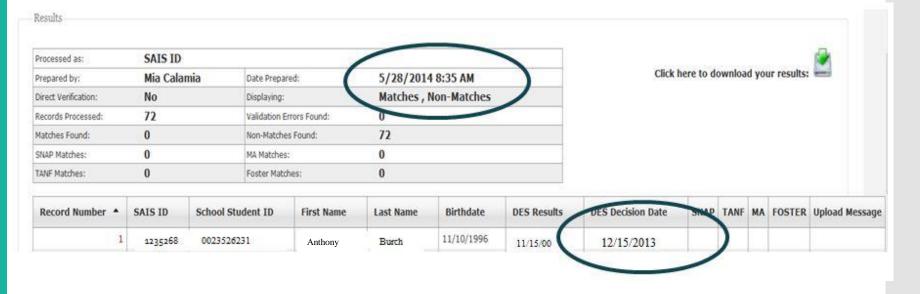
## Report Results FAQ



## Report Results FAQ

Q4. On my results page, if there is a "Decision Date" next to the student, does their FREE meal benefits start at that date?

No, the student is directly certified and begins receiving free meal benefits the date the report was run and the first time they are "Matched" within the program year.



## **Upload Errors**

#### Prepared by: Direct Verification: Records Processed:

#### Upload Error Messages

#### Invalid File Format value detected

Results									
File Upload Processed as:	Invalid File Format value detected								
Prepared by:	Mia Calamia	Date Prepared:	5/22/2014 8:13 AM						
Direct Verification:	No	Displaying:	Matches, Non-Matches, Messages						
Records Processed:	0	Validation Errors Found:	0						
Matches Found:	0	Non-Matches Found:	0						
SNAP:	0	MA:	0						
TANF:	0	Foster:	0	Î					

Click here to download your results:



#### tatus

#### File Upload Status

- Uploading your file...
- Your file was uploaded successfully.
- The file name is: SNA Application 20140512.pdf.
- The file size is: 131,617 bytes.
- The file took 00:00:00.002 (hours: minutes: seconds.tenths of a second) to upload.

#### File Processing Status

- Processing your file...
- Your file has been processed.
- The file took 00:00:00.013 (hours: minutes: seconds.tenths of a second) to process.
- One or more errors were encountered while processing your file. Any error information is displayed above.

#### If you receive this error:

• Ensure the file you have uploaded has the word "Standard" typed in the first row, first column (cell A1)

### Upload Error Messages

#### **No Matches**

If you receive this error:

- Ensure Record Number is the first column
- Ensure First name is second column and Last name is the third column

#### Technical Assistance

If you have any questions on the eligibility when certifying children with Direct Certification, use:

The Eligibility Manual for School Meals found at:

http://www.azed.gov/health-nutrition/nslp/manuals/

For other Direct Certification upload methods, refer back to the ADE webpage

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